



The Pension Fund Investment Forum

Meeting History

July 2019

Disruptive Technologies: Investment Opportunity or Threat to Your Portfolio?

Speakers:

Boe Pahari, Global Head of Infrastructure Equity, AMP Capital
Disruptive Technologies – Opportunities & Challenges

Tatjana Evans-MacLeod, Director, Baillie Gifford & Company
Investing Amidst Seismic Change

Nick Grant, Director, First State Investments
ESG – Investing in Technology & How It Can Help

Chaired by:

James Duberly, Director of Pensions Investments, BBC Pension Trust Ltd. & a Member PFIF Advisory Committee

June 2019

The Global Economic Outlook – Where in the World Next & Should Your Strategy Change?

Speakers:

Scott Thiel, Managing Director & Chief Fixed Income Strategist, BlackRock
An Economic Macro Overview

Anton Heese, Executive Director, Fixed Income, Morgan Stanley Investment Management
Fixed Income Strategy Overview

Laurence Taylor, Senior Portfolio Specialist, Global Equities, T. Rowe Price International Limited
Goldilocks and The Bears: A virtuous Cycle of Innovation and Disruption

Chaired by:

Peter Wallach, Director of Pensions, Merseyside Pension Fund and Member of PFIF Advisory Committee

May 2019

ESG Integration & Stewardship of Fixed Income Assets

Speakers:

Justine Vroman, Senior Investment Manager, Global Sustainable Credit, Pictet Asset Management
ESG in Credit: from Risk Mitigation to Performance Enhancement

Nathalie Cuadrado, Research Analyst, Western Asset Management
Environmental, Social & Governance Investment Approach

Rupert Cadbury, Fixed Income Product Strategist, State Street Global Advisors
Reinventing Climate Investing



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Chaired by:

Ian McKinlay, Chief Investment Officer, Lloyds Bank plc and Chair of PFIF Advisory Committee

April 2019

Latest Developments in UK Real Estate

Speakers:

Nick Duff, Partner and Co-Head of Global Real Estate Team, Aon plc
An Overview of UK Property

Simon Marx, Investment Strategist, European Research & Strategy, LaSalle Investment Management
London Office Outlook

John German, Senior Director, Residential Investment, Invesco Real Estate
The Case for Residential Investment

Darren Rawcliffe, Research Specialist, Nuveen Real Estate Ltd.
Retail Property – Sorting the Wheat from the Chaff

Chaired by:

James Duberly, Director of Pensions Investments, BBC Pension Trust Ltd. and Member of PFIF Advisory Committee

March 2019

Longevity – Latest Developments & Implications for Pension Schemes

Speakers:

Leah Evans, Head of Longevity Analytics & Partner, Risk Transfer Group, Mercer
Longevity Trends – Is the Era of Continued Improvements Over?

Guy Freeman, Business Development, Rothesay Life
Update on the Longevity Risk Transfer Markets

Howard Kearns, Director, Financial Solutions Group, Insight Investment
Practical Aspects of Longevity Hedging

Chaired by:

Chetan Ghosh, Chief Investment Officer, Centrica plc and Member of the PFIF Advisory Committee.

February 2019

Brexit – Whatever the Outcome, What Do Pension Funds Need to Consider or Do?

Speakers:

Toby Nangle, Co-Head of Global Asset Allocation & Head of Multi-Asset, EMEA, Columbia Threadneedle Investments
Financial Market Scenarios for Brexit



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Ralph McClelland, Partner, Sacker & Partners LLP
BREXIT – Legal & Investment Implications for Pension Funds

Michael Bushnell, Managing Director, Lincoln Pensions
Risk Management and Covenant Considerations

January 2019

The Global Economic Outlook – Batten Down the Hatches or Just Keep Riding the Waves?

Speakers:

Anna Stupnytska, Global Economist, Multi Asset, Fidelity
Economic Outlook for 2019/2020 and Beyond

Martyn Hole, Equity Investment Director, Capital Group
Strategic Outlook and Opportunities for 2019 and Beyond for Equities

Robert Almeida, Global Investment Strategist, MFS Investment Management
Strategic Outlook and Opportunities for Fixed Income

November 2018

Smart Beta and Factor Investing Strategies – Have They Been a Success or Failure?

Speakers:

Richard Dell, Partner and Global Head of Equity Boutique, Mercer
Review of Smart Beta and Factor Investing – Has it Been a Success or Failure?

Iheshan Faasee, Managing Director, Client Portfolio Manager, INTECH International
Challenges for Smart Beta and Factor Investing – What Next?

Gaurav Mallik, Chief Portfolio Strategist, State Street Global Advisors
Latest Developments for Smart Beta including ESG Factors

October 2018

Investing in Private Equity today – Taking Unrewarded Risks or Capturing Good Returns?

Speakers:

Ludovic Phalippou, Professor of Financial Economics SAID Business School, University of Oxford and Senior Adviser on Private Markets, BlackRock Investment Institute
The Role of Private Markets in Modern Portfolios

Tim Franks, Partner, European PE Team, Kohlberg Kravis Roberts & Co Partners LLP
Investing in Private Equity Today - Key Challenges and Opportunities

Ian Greenwood, Vice Chairman, West Yorkshire Pension Fund
Pension Fund Case Study



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September 2018

Investing in China: A Look at China's Effect on the World Economy and Impact on your Portfolio

Speakers:

George Magnus, Economist and Author

Contemporary China: political challenges, economic traps, international relations in Xi Jinping's China

James Johnstone, Co-Head Emerging and Frontier Markets, RWC Partners Ltd

Focus on Equity Investing in China

Adriana Cristea, Macro Strategist, Pictet Asset Management

An Introduction to Investing in Chinese Onshore Bonds

July 2018

Global Economic/Geopolitical Outlook – Key Strategic Asset Allocation Opportunities for Pension Funds

Speakers:

David Page, Senior Economist (US & UK), AXA Investment Managers

Timing the slowdown in global growth

Peter Oppenheimer, Chief Global Equity Strategist & Head of Macro Research, Goldman Sachs International
Strategic Outlook and Opportunities for 2018/2019 and Beyond

Andrew Sheets, Chief Cross-Asset Strategist, Morgan Stanley Bank International Limited
Strategic Outlook and Opportunities Across Asset Classes